



CalHEERS Release Notes – 17.7

Agency Portal

Release Date: July 31, 2017

CalHEERS will be updated to version 17.7 on July 31, 2017. These release notes are intended to inform you of the important changes occurring in CalHEERS with release 17.7.

New CalHEERS Agency Portal

Previously, CalHEERS contained one role for Agents: the **Individual Agent Portal**. While individual Agents could modify their profile and view and manage their consumers, there was no functionality for an agency to view a full **Agent Roster** or the agency's aggregate **Book of Business** at an agency level. This made it difficult for agencies to manage a roster of Agents and all business written by those Agents.

Covered California developed the **Agency Portal** to help Certified Insurance Agencies manage all of their Covered California business and easily oversee their Agents, Book of Business, Agent delegations, consumer cases and agency account with a single integrated tool.

The Agency Portal was developed in two phases. These Release Notes highlight only the functionality that is being released in phase one, which will go-live in CalHEERS Release 17.7.

In Release 17.7, there is a new user defined in CalHEERS to manage the Agency Portal. This user is called the **Agency Manager** and performs administrative tasks for an Agency.

The Agency Manager *must* be a certified and licensed insurance Agent with Covered California.

The following functionality exists in the Agency Portal in Release 17.7:

- **View Agent List:** Displays the **Agency Roster**, which includes the Agent's name, how many consumers are delegated to that Agent, the Agent's license number, and certification status
- **Add New Agent:** Create a new Agent profile for new Agents with the agency, including: contact information, languages spoken, product expertise, a short Agent biography, and the subsite locations that will be displayed in the public facing tool "Find Local Help" found on CoveredCA.com
- **Agency Account:** Displays agency Information, such as the legal business name, public facing name, tax ID (FEIN) and agency license number, plus location and hours, document upload, and agency certification status

Add a New Agent to an Agency

Previously, an individual Agent had the ability to create a Covered California CalHEERS account that was not associated to an agency.

In Release 17.7, the Agency Manager is required to create the new Agent profile in the Agency Portal. This begins the certification process for the Individual Agent with Covered California. If an Agent is already certified with Covered California, we will review their certification status and update their status to "Certified" for the Agency.

Review our [Add a New Agent to an Agency Job Aid](#) for step-by-step instructions.